

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp: RECEIVED  
SECRETARY OF THE SENATE  
PUBLIC RECORDS  
2017 NOV 30 PM 4:24

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): November 16, 2017 - November 17, 2017

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$32.20	\$139 +tax	\$95.37	\$15 Pen, notebook, subject matter materials
<input checked="" type="checkbox"/> Actual Amount				

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached

11/29/17 Rodney Evans [Signature]  
(Date) (Printed name of traveler) (Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

11/29/17 [Signature]  
(Date) (Signature of Supervising Senator/Officer)

# EMPLOYEE PRE-TRAVEL AUTHORIZATION

Date/Time Stamp:  
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**Pre-Travel Filing Instructions:** Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at [ethics.senate.gov](http://ethics.senate.gov). Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

2017 NOV 30 PM 4:24

Name of Traveler: Rodney Evans

Employing Office/Committee: Office of Sen. Mike Lee (R-UT)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): 11/16/17 - 11/17/17

Note: If you plan to extend the trip for any reason you must notify the Committee.

Destination(s): Richmond, Virginia

Explain how this trip is specifically connected to the traveler's official or representational duties:

The lectures related to education reform and welfare reform will help me better understand policy issues related to my portfolio

Name of accompanying family member (if any): \_\_\_\_\_

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

10/16/2017

(Date)

Rodney Evans  
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Senator Mike Lee hereby authorize Rodney Evans  
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

10/16/2017

(Date)

Mike Lee  
(Signature of Supervising Senator/Officer)



# Emerging Leaders 2017 Retreat

Thursday, November 16 – Friday, November 17, 2016  
Omni Richmond | Richmond, Virginia

## – AGENDA –

### THURSDAY, NOVEMBER 16, 2017

9:45 – 10:15 a.m.	<b>ATTENDEE CHECK-IN</b> <i>Attendees leave luggage at the bus after check-in</i> <i>Boxed lunches provided on board the bus</i>	<i>The Heritage Foundation</i> <i>214 Massachusetts Ave., NE</i>
10:15 a.m.	<b>ATTENDEES BOARD THE BUS</b>	
10:30 a.m.	<b>THE BUS DEPARTS TO OMNI RICHMOND</b> <i>(or 20 minutes after last House vote)</i>	
1:30 p.m.	<b>THE BUS ARRIVES AT OMNI RICHMOND</b>	
1:30 – 3:00 p.m.	<b>REGISTRATION, WELCOME &amp; LEADERSHIP EXHIBIT</b> <i>Attendees check-in to overnight rooms and then gather to participate in the informational exhibits highlighting Heritage educational programs and leadership materials</i>	<i>Omni Richmond</i>
3:00 – 4:00 p.m.	<b>EMERGING ISSUE #1 –</b> <b>Legal Immigration Reform, Border Security &amp; Immigration Enforcement</b>  David Inserra <i>Policy Analyst, Homeland Security</i> <i>The Heritage Foundation</i>	
4:00 – 5:00 p.m.	<b>EMERGING ISSUE #2 –</b> <b>Welfare Reform, Economic Growth &amp; the Impact of Federal Policies</b>  Salim Furth <i>Research Fellow, Macroeconomics</i> <i>The Heritage Foundation</i>	
5:00 – 6:00 p.m.	<b>BREAK</b>	

6:00 – 8:00 p.m. **DINNER & KEYNOTE ADDRESS**  
**Lessons on Leadership from a Former USAF Thunderbirds Commander**  
  
J.V. Venable  
*Senior Research Fellow for Defense Policy, The Heritage Foundation*  
*Former U.S. Air Force Thunderbirds' Commander*

8:00 – 9:00 p.m. **AFTER DINNER DISCUSSION**  
**Is Free Speech Dead on College Campuses?**  
  
Arthur Milik  
*Associate Director, B. Kenneth Simon Center for Principles & Politics*  
*The Heritage Foundation*

### **FRIDAY, NOVEMBER 17, 2017**

8:30 a.m. **LUGGAGE DROP-OFF**  
*Attendees leave their luggage at the Heritage luggage check*

9:00 – 10:30 a.m. **BREAKFAST**  
**President Reagan on Leadership, A Historical Perspective**  
  
Lee Edwards  
*Distinguished Fellow in Conservative Thought*  
*The Heritage Foundation*

10:00 – 10:15 a.m. **BREAK**

10:15 – 11:45 a.m. **EMERGING ISSUE #4 –**  
**Designing a Free market Agriculture Policy**  
  
Daren Bakst  
*Research Fellow in Agriculture Policy*  
*The Heritage Foundation*

10:30 a.m. **THE BUS DEPARTS OMNI RICHMOND**

11:45 a.m. **THE BUS ARRIVES AT THE MARINE CORPS MUSEUM**

12:00 – 2:30 p.m. **LUNCHEON AND EMERGING ISSUE #4 –**  
**Top National Security Threats Facing the U.S.**  
  
Dakota Wood  
*Senior Research Fellow, Defense Programs, Center for National Defense,*  
*Davis Institute for National Security and Foreign Policy,*  
*The Heritage Foundation*

*Tun Tavern*  
*Marine Corps Museum*

2:30 p.m. **CONFERENCE CONCLUDES**  
*Attendees board the bus*

2:30 p.m. **THE BUS DEPARTS MARINE CORPS MUSEUM**

3:30 p.m. **THE BUS ARRIVES AT THE HERITAGE FOUNDATION**



This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

1. Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation

2. Description of the trip: Richmond, VA

3. Dates of travel: 11/16/17- 11/17/17

4. Place of travel: Richmond, VA

5. Name and title of Senate invitees: Please see attached

6. I *certify* that the trip fits one of the following categories:

☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

- OR -

☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).

7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.

- AND -

☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

8. I *certify* that:

☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.

- AND -

☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor of the trip and is solely responsible for the execution of it.

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation is a research and educational institution whose mission is formulate and promote conservative public policies. This retreat is part of that educational mission.

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation hosted a similar retreat to this one last year. Additionally, Heritage has hosted numerous staff level retreat connected to educational fellowships as well as an annual member level retreat for members of the House.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

The Heritage Foundation hosts around 400 events on Capitol Hill each year. These include educational fellowship, topical briefings, and working groups.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate  <input type="checkbox"/> Actual Amounts	\$27	\$139	\$11/16: \$43 \$11/17: \$40 Total: \$83	\$15- Pen, notebook, subject matter materials

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The event is arranged specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Richmond, VA is easily accessible from Washington, and is an appropriate distance from Washington to ensure focus on the educational benefits of the trip.

19. Name and location of hotel or other lodging facility:

The Omni Richmond

20. Reason(s) for selecting hotel or other lodging facility:

The Omni has adequate facilities and meeting space for a group this size.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The daily expenses meet the federal per diem rate for Richmond, VA.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

**Attendees will travel in a charter bus.**

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: [Signature]

Name and Title: Bridgett Wagner, Vice President

**Name of Organization:** The Heritage Foundation

Address: 214 Massachusetts Ave NE Washington, DC 20002

Telephone Number: 202-546-4400

Fax Number: \_\_\_\_\_

E-mail Address: [bridgett.wagner@heritage.org](mailto:bridgett.wagner@heritage.org)



# Emerging Leaders 2017 Retreat

Thursday, November 16, 2017 – Friday, November 17, 2017  
Omni Richmond Hotel | Richmond, VA

## INVITATION LIST

**About the List:** The following individuals were extended an invitation to The Heritage Foundation's Emerging Leaders 2017 Retreat due to their interest in conservative policy making and their status as emerging leaders

Bailey	Jake	Senator Tom Cotton				Legislative Assistant
Bathon	Mary	Senator Mike Lee				Legislative Assistant
Batie	Cicely	Senator Deb Fischer				Legislative Correspondent
Call	Kelsey	Senator Mike Lee				Staff Assistant/Intern Coordinator
Chaudoin (McCabe)	Katie	Senator David Perdue				Legislative Correspondent
Chestnut	Annie	Senator Ron Johnson				Legislative Correspondent
Davis	Rachael	Senate Committee on Small Business and Entrepreneurship				Staff Assistant
Dwyer	Kaitlyn	Senator John Neely Kennedy				Legislative Correspondent
Evans	Rodney	Senator Mike Lee				Legislative Correspondent
Farr	Michael	Senator Joni Ernst				Legislative Aide
Farris	Adam	Senator James Lankford				Legislative Assistant
Finer	Jonathan	Senator Cory Gardner				Legislative Correspondent
Fisher	Sam	Senator Pat Toomey				Press Assistant
Foster	Steven	Senator Steve Daines				Legislative Aide
Garand	Brian	Senator Bill Cassidy				Staff Assistant
Gordon	Ariel	Senator Ted Cruz				legislative correspondent
Hansen	Carolyn	Senator Mike Lee				Legislative Correspondent
Hart	Jacob	Senator Mike Lee				Legislative Correspondent
Haymans	Parker	Senator Lisa Murkowski				Legislative Correspondent
Hetzel	David	Senator Chuck Grassley				Legislative Correspondent
Hinojosa	Alec	Senate Health, Education, Labor, and Pensions Committee				Research Assistant

Hunter	Kate	Senator Tim Scott				Legislative Correspondent
Jackson	Adrienne	Senator James Inhofe				Legislative Correspondent
Johnson	Mac	Senator James Lankford				Legislative Correspondent
Krell	Kaitlin	Senator John Barrasso				Legislative Correspondent
Kros	Grant	Senator Deb Fischer				Staff Assistant
Kumar	Harry	Senator Marco Rubio				Legislative Assistant
LaJoie	Taylor	Senator Mike Lee				Legislative Correspondent
Lauterbach	Jennifer	Senator John Neely Kennedy				Legislative Correspondent
Lavery	Emily	Senator Tim Scott				Deputy Legislative Assistant
Lewis	Katherine	Senate Health, Education, Labor, and Pensions Committee				Research Assistant
Lord	Anne	Senator Ben Sasse				Staff Assistant
Mahan	Jesse	Senator James Lankford				Legislative Aide
Mathis	Jenna	Senator Ron Johnson				legislative correspondent
McCabe	Katie	Senator David Perdue				Legislative Correspondent
McCullough	Noah	Senate Republican Whip				Policy Assistant
Minnich	Tyler	Senator Pat Toomey				Legislative Assistant
Mitchell	Andrew	Senator John Cornyn				Legislative Correspondent
Moore	Nick	Senator Luther Strange				Legislative Assistant
Mulkin	Elliott	Senator Ted Cruz				Legislative Correspondent
Mulopulos	Sam	Senator Rob Portman				Legislative Assistant
Orr	Caleb	Senator Marco Rubio				Legislative Assistant
Overland	Abbey	Senator Joni Ernst				Legislative Assistant
Parsons	William	Senator Steve Daines				Legislative Correspondent
Peake	Katie	Senate Richard Shelby				Staff Assistant
Peterson	Margaret	Senator Joni Ernst				Legislative Correspondent
Pierce	Rob	Senator Rob Portman				Press Assistant
Poirier	Sara	Senator Susan Collins				Director of Constituent Correspondence
Poulos	Bethany	Senator Marco Rubio				Legislative Aide
Pyron	Rob	Senator John Hoeven				Legislative Correspondent
Rankin	Duncan	Senator Luther Strange				Legislative Correspondent
Rankin	Charles	Senator Luther Strange				Legislative Correspondent
Robinson	Erinn	Senator Marco Rubio				Press Assistant
Sacasa	Ted	Senator Marco Rubio				Legislative Aide
Sandler	Gabe	Senator Chuck Grassley				Legislative Correspondent
Scheich	Johanna	Senator John Thune				Deputy Scheduler

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